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2 Soil Conservation Service
Office of the Chief of Operations
August 11, 1952

Summary of Conference,
Service Work Improvement Council,
Washington, D. C.,
July 14-18, 1952 //



Mr. D. A. Williams, Chairman of the Service Work Improvement Council, called the meeting to order at 9:30 A.M., July 1, 1952. Council members present were O. C. Bruce, Region 1; J. E. Gates, Region 2; R. L. von Treba, Region 3; H. N. Smith, Region 4; H. G. Bobst, Region 5; R. V. Boyle, Region 6; W. R. Van Dersal, Region 7; F. J. Hopkins, Washington, D. C., Secretary of the Council. The Chief, Dr. Robt. M. Salter, and Mr. J. C. Dykes, Deputy Chief, participated in the opening session of the council. Members of the Washington staff attended meetings throughout the week, working on subcommittees and assisting in the development and presentation of subcommittee recommendations.

In his remarks to the group, Dr. Salter commented on the importance of continuing joint consideration and examination of work improvement matters, pointing out that these meetings provide an opportunity to share experience in better ways of doing work and to spread the application of more efficient methods and procedures. Particular emphasis was placed on the importance of good supervision in attaining high production and in the proper administration of our work. (Dr. Salter's remarks on supervision are given in more detail in his memorandum to Regional Directors and State Conservationists, dated July 22, 1952).

Dr. Salter stressed the need for all possible efficiencies to lighten the heavy work load caused by ACP activities. The fine cooperation in Washington is encouraging. There is good prospect for getting more

uniformity in ACP procedures and Regions can help on this problem by pointing up issues and referring them to Washington for discussion with ACP officials. On the subject of the county committee farm by farm survey, we do not regard this work as farm planning and ACP officials share this view, although it may take some time to get this point clarified. We have met no resistance to the idea that Soil Conservation Service technicians are the people qualified to make farm plans.

In referring to technical responsibilities, the Chief stated that Soil Conservation Service men should be a top-flight, well-trained group of people who interpret and synthesize agricultural science and adapt it to the pattern of the farmer or rancher. We must keep up with the best that agricultural science has to offer. Much depends on the individual, his study of agricultural technology, and effort toward self-improvement.

Mr. Williams emphasized the need for reorienting our thinking and that of all Soil Conservation Service employees regarding our concept on conservation. Emphasis has been placed largely on the physical aspects of the conservation job and perhaps not enough on soil deterioration, loss of productivity, and soil amendments. The Service has the job of synthesizing technology, inventorying data, and assisting in the application of conservation practices. We have the job of interpreting basic data where it exists and of obtaining it in cases where it is not yet available.

Mr. Williams called attention to the Service responsibilities as outlined in the Chief's talk at Manhattan, Kansas, June 6, 1952 on "Doing the Conservation Job Together" and urged careful study of this document.

Mr. Williams pointed out that one objective of the Service realignment is to put more people and funds at the work unit level. A better balance of supervision should be brought about by standardizing, insofar as practicable, the area work load. The area conservationist will be

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responsible for administrative and technical work within the area. He must be primarily an efficient administrator. Key supervisory officials throughout the Service have an important responsibility in helping area conservationists to understand their responsibilities and to do their job of operations management efficiently. This will necessitate thorough training and orientation and close supervision. Emphasis was placed on the necessity for close and harmonious working relationships between newly created operations branches. Mr. Williams pointed out that there was no intention of setting up duplicating jobs in the branches. The objective is to make the best possible use of Service resources through close working relationships.

Mr. Dykes commented that the proper interpretation of the term "operations management" is the efficient use of resources to accomplish the most work. In organizing for this job the Service has tried to keep the span of influence to a minimum. Assistant state conservationists - if more than one - will operate on a functional basis. The area conservationist is considered to be the counterpart of the assistant state conservationist for operations management and the assistant director at the regional level. The Washington representative on operations management will work primarily with 7 regional representatives while the assistant regional director will work primarily with the assistant state conservationists. Assistant state conservationists will work with approximately 6 to 10 area conservationists.

Mr. Williams emphasized the urgency of developing an adequate system in all regions for checking up on the adequacy of Soil Conservation Service performance in connection with 1278 responsibilities. In some regions we still have the task of organizing this job and developing adequate records to support certifications made by Soil Conservation Service personnel. This is essential since any audit of payments for

practices will require appropriate records to support the amount paid on Soil Conservation Service certification. Systematic checking is needed to insure accuracy of records and quality of performance.

The work improvement council considered the following general topics:

1. Scheduling servicing activities on PMA work.
2. Service representatives participating in training activities for PMA community committeemen in connection with 1953 AC Programs.
3. Spot checking performance and procedures in carrying out 1278 responsibilities.
4. System for annual programming.
5. Production management activities of Area Conservationist.
6. Procedure for obtaining needed information for (a) "current conservation needs", (b) practices "now on the land".
7. Work Improvement Activities.

These subjects were discussed in general session following which subcommittees developed and presented the attached recommendations which were reviewed and approved by the council. These recommendations were considered by the Chief and Regional Directors at their Minnesota meeting. All recommendations were approved and necessary follow-up action by regions and the Washington office can be started immediately.

Attachments

SCHEDULING SERVICE ASSISTANCE ON ACP WORK

ACP WORK PART OF ANNUAL PLAN OF OPERATIONS

The scheduling of Service assistance to ACP participants on permanent-type practices should be an integral part of the work unit's annual plan of operations. It should be made as much a part of assistance to district cooperators as feasible. This part of the work unit's responsibilities should receive careful consideration at the time the total work load analysis is made and the annual plan and schedule prepared.

COMPLETE UNDERSTANDING AND AGREEMENT ESSENTIAL

A complete and detailed understanding and agreement between the PMA State or County Committee, a representative of SCDs and the Service representative regarding such matters as the meaning of the basic conservation objective of the Department, need and feasibility determinations, specifications and sequence of application of practices, the screening, orderly flow and processing of technical assistance referrals, procedures of certification and the making available of needed program services or 5% funds for additional technical services is absolutely essential to cooperative work on ACP. At the County level the governing body of the Soil Conservation district should be invited to participate in the consideration and decisions on such matters. Joint field trips by the PMA County Committee, the SCD governing body and Service technicians to study the basic Conservation objective, district cooperative agreements, and the benefits, need, sequence and specifications of practices is a most effective method of arriving at a common understanding and firm decisions.

ESTIMATING WORK LOAD

To efficiently schedule Service assistance to ACP participants it is necessary to know the amount and kind of assistance needed and when it will be required. The PMA plan to contact every farmer in each county before the

beginning of the program year to determine his requests for ACP assistance should make available reasonably accurate estimates of the amount of each permanent-type practice on which Service Assistance will be needed during the year. If there are counties in which such contacts are not made, the PMA County Committee and the Service representative can make these estimates from PMA historical records and the amount of funds set up for each practice for the current year. The State Conservationist, with assistance from regional and field technicians, should determine for homogenous areas of the state the time in man-hours of Service assistance required for making need and feasibility determinations, for laying-out, checking and certifying a unit of each practice for which the Service has technical responsibility. The application of these time-factors to the estimated units of each practice to be applied during each portion of the year will give the amount of Service assistance required on ACP work. This estimated requirement when compared with Service resources available for ACP assistance will point up scheduling problems and the need for PMA to furnish program service personnel to work under Service supervision or to transfer funds to the Service under the 5% provision. Such an analysis will reveal also the need for the Service to make transfers or seasonal or temporary details of personnel from one county or state to another to meet peak loads. It should be the responsibility of each line-officer to notify his supervisor if he is unable to meet, in a reasonable time, the need for technical assistance.

APPLICATION PROCEDURES

It will make for greater efficiency and less lost-time trips if the PMA County Committee will notify each applicant that his request has been "tentatively approved" for a given amount of a practice or practices, that he should request technical approval and assistance from the SCS before applying the permanent-type practices and that he is responsible for noti-

fying the SCS representative as far in advance as possible when he will be ready to start application. PMA County Committees should agree that such "tentative approval" on their part constitutes authority for the Service to proceed immediately to lay out the practice, if needed and feasible, without further reference to the Committee. Otherwise, duplicating trips to a farm to determine need and feasibility and to lay out the practice will result.

GROUP MEETINGS AND FIELD TOURS SUGGESTED

Community and neighbor group meetings or some combination of such meetings jointly sponsored and conducted by PMA Community Committeemen, SCD representatives and SCS personnel are one method whereby the assistance of all three agencies can be effectively and economically scheduled to groups of landowners and operators. Such meetings could serve to explain the basic conservation objective of the Department, the objectives, organization and program of soil conservation districts, the assistance available from PMA, the SCD and SCS and procedures for obtaining such assistance. Contractors could be invited to attend such meetings and explain their services. A major purpose of the meeting should be to develop a schedule of assistance to all in attendance who request and are ready for ACP and SCD help and who might need the services of a contractor. Such scheduling of work with groups concentrated geographically would conserve time and travel for all concerned and allow for orderly scheduling of assistance where and when needed. It should bring about also a better understanding by each agency and contractor of the procedures and problems of the others and lead to better cooperation.

Where feasible such meetings should include a field trip to study land capabilities and needs, the benefits resulting from the use of conservation practices and the advantages of developing and applying progressively a basic conservation plan for the entire farm.

PROCEDURE FOR APPLICANTS WHO DO NOT ATTEND MEETINGS

ACP applicants who do not attend such meetings could inform the Service representative by mail or personal contact of their readiness for technical assistance. They should be led to understand that their work must be fitted into a schedule probably extending days or weeks into the future and the advantages to them of making their needs known as far in advance as possible.

ACP PARTICIPANTS SHOULD BECOME SCD COOPERATORS

Each ACP participants should be given an opportunity to become a district cooperator as soon as he has an understanding of the basic conservation objective, the organization and program of the district and indicates a desire to develop and carry out progressively or immediately a basic conservation plan for his land.

DEVELOP SCHEDULES FOR ACP WORK

As rapidly as the amount and kind of ACP work to be done and the resources with which to do it are known for any period of time a schedule for the period should be developed, taking into consideration the other district work needed and scheduled in the work unit's annual plan of operations. Where possible schedules should be developed on at least a quarterly basis and refined in the monthly or weekly schedules.

Service Representatives Participating in Training Activities for
PMA Community Committeemen in Connection with 1953 AC Program

Reference is made to the Chief's memorandum of July 3, 1952, above subject.

Plans for training community committeemen

Plans of PMA are to conduct training sessions with community committeemen during the two weeks following their election and the elections will be conducted during the period July to October, varying by states. It may not always be possible to attain that objective. Since in some States the 1953 program year is already under way, we must be prepared to give requested assistance on short notice. The Service Work Improvement Council has studied this subject and has made the following recommendations for a plan of action.

Plans to be prepared jointly by SCS and PMA

Plans worked out in Washington jointly between PMA and SCS call for conducting training sessions with community committeemen, part of which will be indoors and part outside on the ground. It is anticipated that county committeemen will request assistance of the SCS representative in the county. In this connection you are advised that "5 percent money" can be used for this activity. The PMA will have training subjects of its own, of course, and we may expect to have only part of the total time set up for training.

Planning at State level

State Conservationists should discuss the general training plan with the PMA State Committee and officers of the State Association of SCD's. When and if the State PMA Committee expresses the desire to go ahead and ask for SCS assistance in training, the area conservationists should be advised.

Planning at area and county level

In turn, area conservationists should make provision for SCS representatives in counties, usually the work unit conservationists, to discuss training

plans with county committeemen. Ordinarily this should not be until after the county committee has requested assistance of SCS. . Wherever there are soil conservation districts, it will be advisable for the SCS representative to discuss the purpose and scope of the training sessions with the board of supervisors, and where county committees are agreeable, it would be very desirable to have a district supervisor present during the sessions. When assistance is requested, the SCS representative should work with the county committee in jointly developing the training plan. The training, to be successful, should be planned ahead of time, and there should be full agreement on the subjects to be discussed and sequence in which they will be presented, as well as whether they will be covered indoors or out. It would also be advisable for the PMA District Field Man to be present, not only during the development of the training plan but during the training sessions as may be possible.

Regional office assistance will be available to assist state and area offices in connection with development of training outlines and other phases of the job. The training officer and regional technical specialists will be in developing plans. It should be possible for the local technicians to handle the community committeemen training sessions without participation on the part of regional or state people.

Training objective to be attained during designated periods

As stated above, training periods will vary by states so that each state conservationist should learn from the state PMA committee the approximate dates of elections and training sessions. Completion of training during the period should be an objective. In any event, wherever there is indication on the part of the PMA State committee that assistance will be requested in counties, the SCS representative designated in the county should be fully

prepared to carry out his part of the job. The area conservationist should give him such guidance as may be necessary.

Length of training sessions

There is no indication as to length of time which county committees may provide for this type of training. It is believed that two days for the SCS portion would be about right. The technician should be prepared to cover his subjects in one day if necessary. He should bear in mind that he will have only a part of the total time.

Size of groups

Following well known training principles, it is believed that we should urge county committees to gather into one meeting not more than about 25 community committeemen. The PMA office advises us that there are, on the average, between 20 and 30 community committeemen per county. This means that in many counties there will be in excess of 25, and it is suggested that in these large counties the groups be split up and, where practicable, training sessions should be held by problem or land use areas. Thus there should be common interest on the part of the committeemen.

Use SCD agreements where available

By way of preparation for our participation in training, the SCS representative should get the names of the community committeemen who will be in attendance at the various meetings. He can then determine whether they have SCD agreements, and where such is the case, they should be urged to take their copies along to the meetings. To be safe the SCS representative should take file copies with him.

Participation by SCD supervisors

It should be suggested to the county PMA committee that at least one SCD supervisor attend the training session and be urged to bring his conservation farm plan. The supervisors can explain the operation of the soil

conservation district. (It is the desire of the PMA to have soil conservation districts explained and it would be more effective if a member of the board of supervisors or other district representative could do this.)

Use of technical guides and visual aids

The SCS representative should review technical guides applying to the area, particularly if he is new in the county, as might be the case after "realignment." He should have visual aid material on hand with outlines for conducting land capability tours. As stated elsewhere, training is to be both inside and outside. Which should be first is a matter to be determined according to local judgment. It is probable that a tour of farms first would be preferable.

Concentrate training on essential needs

The training agenda should be confined to a relatively few subjects. It is believed that the following are of major importance:

1. Discussion of the basic objective of the Department and accompanying this, of course, a brief description of land capabilities and proper land use. This should be related to classes and conditions occurring within the county.
2. Discussion of major conservation problems occurring in the county.
3. Discussion of applicable conservation practices both permanent and recurring. The technical guides in many soil conservation districts contain a long list of practices. If at all possible, the number of practices to be stressed in these discussions should be limited to four or eight as a maximum and possibly in some districts to three or four. They should be the "most needed" or essential practices in the county or problem areas. Along with the listing of practices, there should be a discussion of the proper combinations and the sequence of installation.

4. Discussion of farm and ranch planning processes in soil conservation districts. This should be in brief outline, and if the district supervisors present are capable of handling the subject, that would be ideal. (This subject was suggested by Charley Mays, Chief, ACP Branch.)
5. Discussion on how to use farm and ranch plans in selecting the most needed practices. Some sample plans should be on hand, and if at all possible, the plan belonging to a committeeman or a district supervisor, who would be present, should be used as an example.
6. Explanation of the operation of soil conservation districts and the advantages of being a district cooperator (to be handled by district board representative.)

Relative to all these subjects, the SCS representative should have on hand such visual aids or exhibits as will enable him to better put across his ideas. This should include information relating to the benefits which farmers may expect from carrying out conservation practices.

Subjects which should be presented in the office and which on the ground can be left up to local judgment. Land capability can best be illustrated in the field, and much better understanding of many practices and their benefits can be obtained by looking at them on the ground, particularly if they have been properly applied. Weather permitting, it may be possible to handle some other subjects out of doors.

Spot Checking Performance
and Procedures in Carrying out 1278 Responsibilities

The position of technical leadership in the field of conservation held by the SCS has been earned by the quality of technical work done by the SCS. In order that this position can be maintained and improved it is important that an orderly procedure be established to insure that all conservation measures planned and applied meet established standards. In addition to determining that established standards are being met, this procedure will also assist in training personnel.

The procedure established should provide for examinations, inspections, or other types of review in sufficient detail to actually field check the planning, design, layout and construction of all conservation practices. While the planning and application of all conservation practices are equally important to the SCS, Field Memo. No. 1278 placed definite responsibility for certain permanent-type practices on the SCS. In order to meet these specific responsibilities, while at the same time recognizing that they should apply to all conservation practices, the following procedure is proposed:

1. That the Washington Office issue a communication to the regions elaborating on item 6-a, page 5 of field Memorandum No. 1144.
2. That this communication set forth the principles and guides contained herein.
3. That regions be directed to: (a) issue instructions to the states setting forth a regional system for spot-checking permanent-type practices which shall conform to the principles and guides contained herein or: (b) examine instructions heretofore issued to determine whether they conform to the principles and guides contained herein, and make such amendments as may be necessary.

Principles and Guides

The Council feels that the whole system of checking, certifying and spot-checking permanent-type practices is closely inter-related and therefore wishes to set forth some principles that apply to checking and certifying.

Checking and Certifying

1. The Service representative is responsible for checking and certifying compliance for certain designated permanent-type ACP practices.

2. The Service representative can authorize others to check practices, and in some cases may authorize others to certify compliance. Neither of these delegations of authority will relieve the SCS representative of his responsibility.

3. Since the SCS representative is responsible for delegated activities done by others, he will examine samples of the work of each person in sufficient detail to assure himself of its adequacy.

4. Adequate records will be made and maintained in the SCS files to substantiate the certification of compliance.

5. Each region will specify the records and methods of recording, for both layout and checking, for each practice.

(The provisional guide sent out by the Chief of the Service under date of July 27, 1951, contains recommended items to be checked for each permanent-type practice. In some states specifications for individual practices will require some deviation from the items suggested).

6. When checking any practice for compliance the applicable specification in, or referred to in, the PIA Handbook is the minimum standard against which the practice is being checked. Therefore, every effort should be made by the SCS to get specifications in the PIA Handbook, in accordance with SCS technical standards.

Spot Checking

1. Spot checking will be done by an SCS employee other than the one having responsibility for certifying the practices being checked.

2. No SCS employee will be required or permitted to check the work of his supervisor.

3. Spot checking responsibilities will be assigned only to technically qualified personnel. For example, in spot checking engineering practices:

- a. Work planned and installed under the direction of work unit conservationist be spot checked by GS-7 engineer.
 - b. Work of a complexity to require planning and installation by a GS-7 engineer be spot checked by a GS-9 engineer.
 - c. Similarly, that work of a complexity to require planning and installation by a GS-9 or GS-11 engineer be spot checked by an engineer of higher grade if such personnel are available.
- That Regional Engineering Specialists be given a responsibility for spot checking these more complex practices.

Other recommendations of the Engineering Council have been amended by the Work Improvement Council so that they will apply to all permanent-type practices and as amended are recommendations of the Work Improvement Council.

4. That a representative sample up to 5 percent of the work in any area be spot checked whether or not ACP payments are involved. This will include a sample of the work of each individual, on each type of practice, for which he checks compliance.

5. Areas will be designated and the work so scheduled for each individual who is responsible for spot checking, that it can be done as promptly as possible. This work will be made a part of his regular duties.

6. Training material will be developed by appropriate regional technical divisions to guide designated personnel in making spot checks.

7. Personnel responsible for spot checking will report their findings to the State Conservationist through the Area Conservationist, with copies to respective Service representatives. Where work is found to be not in accordance with applicable specifications, the Service representative will advise the farm concerned and recommend the corrective measures needed to bring the job to the required standards. The Service representative will report the discrepancies to the PMA County Committee immediately.

A SYSTEM OF ANNUAL WORK PLAN DEVELOPMENT

The development of annual work plans for Service operations must give recognition to all Service-wide programs, including, for example, assistance to soil conservation districts, operation and maintenance of Federally-owned lands such as land utilization projects, operation of Case-Wheeler projects, flood control surveys and operations works, activities in connection with Memo. No. 1278, and the like. Regions and states must similarly give recognition to such of these programs as may be applicable to their territories.

An annual plan that properly meshes objectives, activities, or jobs into a going program at each level of Service activity depends on a smooth, understandable and timely flow of Washington, regional and state objectives. Such objectives or recommended changes in activities of the Service, be they new or emphasis on the old, should flow from the Washington office to the Regional, State, Area and Work Unit offices during the period from September to December. Each level of the Service, during the dates specified, should present and thoroughly explain their current objectives and recommendations. Armed with this information and a working knowledge of its application, each level of the organization is then ready to give further consideration to the development of annual operations plans for more efficient utilization of personnel, time and materials.

A system of annual work plan development,^{1/} whether Washington, region, state, area, or work unit, must involve the following:

^{1/} Definitions of plan of operation, work unit analysis, etc. are attached as a supplement to this statement.

1. An appraisal of the objectives--both from the standpoint of the Service and the soil conservation district. This appraisal must recognize such things as the soil conservation districts plan of work, trends in agriculture, pattern or system of farming for the local area, drainage enterprises, community watersheds, flood control operations, neighbor group work, etc.
2. An analysis of soil and water conservation problems, the priority of attacking these problems and the sequence in which component parts of the program should be carried out to meet both work load and technical requirements.
3. A work load analysis to determine (1) what the local problems and situations are, (2) the amount of desired work to be performed in a definite period, (3) the manpower and other resources available, (4) the approximate rates of accomplishment per man expected for the staff available, (5) how much has been done to date, and rates of accomplishment, (6) materials and equipment available to accomplish the desired soil and water conservation program within a given territory and within a given time, and (7) an analysis of present and potential assistance from Federal, state, and local agencies, boards of supervisors, seed and equipment dealers, and other business firms.

4. Setting of goals--the development of stated objectives and quantities of work for the planning period and, likewise, the needed resources, methods and procedures to meet these goals.
5. Work delegation--which involves the assignment of certain work activities to the personnel available.
6. Scheduling--which involves setting up of seasonal schedules of activities and time and place schedules of personnel.

For annual work plan development to be understood, appreciated, and effective, there must be a meeting of minds at the various levels as to the need, purpose and place of each of the activities. This requires that the Washington people meet with the regions, the regions with the state, the state with the area and the area with the work unit. This further requires that prior to the conference at either level, each office should thoroughly analyze, study and develop suggestions for the improvement of a particular program.

The following example suggests one means of systematically transmitting recommendations for consideration in the development of annual plans throughout the Service. It is recognized that recommendations and suggestions for program improvement made throughout the year in the normal course of business have many constructive results. However, it is felt that some such contributions fall short of implementation primarily because they are not taken into account in annual plans and resources provided for carrying them out. While

this particular example may not be adopted to procedures in all regions, the principle of organizing staff recommendations as a factor in improving annual programming is a matter which deserves careful attention.

Step 1 - (to be done prior to September)

The Washington office, utilizing the assistance of all appropriate staff members, should develop and transmit by personal representation or otherwise to the Regional Directors suggestions for improvement of the regional program. Suggestions should include new developments or techniques drawn from research and field experience or necessary re-emphasis of existing activities.

Step 2 - (to be done by October 1)

The Regional Directors, in collaboration with their regional staff will study and develop, using the Washington suggestions and experience of their own, suggestions for technical improvement of each phase of the program. These suggestions to be developed for each state.

Step 3 - (to be done by October 15)

The suggestions developed in step 2 above to be mailed by the Directors to state conservationists for their study, review and additions.

Step 4 - (to be done by November 15)

The state conservationists will each come into the regional office and discuss with the Regional Directors and their staffs

the suggestions to be included in the state program. They will decide what will be recommended for annual work plans area by area for the state.

Step 5 - (to be done by December 1)

The state conservationist will repeat the procedure in step 4 with each of his area conservationists.

The state conservationist will not only discuss and explain each of the recommendations to be included in the area plan of work but will also advise with the area conservationists on such things as (1) help from the regional technical staff and resident specialists, (2) training needs, (3) analysis of work loads, (4) methods, procedures and techniques to be employed, (5) setting of goals, and (6) work schedules, etc.

Step 6 - (to be completed by December 15)

Each area conservationist will meet with his staff. He will present and explain the suggestions for technical improvement for the area, discussing needed technical improvements work unit by work unit. He will explain the technical assistance to be received from the regional staff, and resident specialists and will give leadership to the work units in the development of their plan of work for the coming year covering all activities specified under step 5 above. He will also solicit suggestions on problems that should be considered in the next succeeding annual work plan. Area conservationist will deliver to state conservationist his area plan of work

for the coming year with recommendations of problems to be considered in the following year.

Step 7 - (to be done by January 1)

State conservationist will deliver to Regional Director his plan of work and recommendations based on step 6.

Step 8 - (to be done by February 1)

Regional Director will submit to the Chief in Washington his annual plan and recommendations based on step 7.

Committee: J. E. Gates
C. B. Brown
H. O. Ogrosky

7/17/52

SUPPLEMENT

PLAN OF OPERATIONS

There has been some confusion with respect to the content of the annual plan of operations and the relationship between it and work unit analysis, standards of performance, goals and schedules. In order to clear up this confusion it is suggested that the following or a similar statement be given appropriate distribution:

The annual plan of operations is a statement of objectives in terms of work to be done. The work unit analysis, standards of performance, goals and schedules are intimately related and each supplements the other. It should include only those items which will be given major emphasis during the year and should be brief, concise and specific. General, meaningless statements such as "continue the improvement of the quality of the work" should be avoided. Routine items such as maintaining records, writing reports and meeting with district governing bodies are extraneous. Annual plans of operations should give consideration to seasonal aspects of various activities. For example, farm planning should not be undertaken when farmers are busy with spring work.

Standards of performance for each type of activity should be prepared between the employee and his immediate supervisor and must be established before realistic goals can be fixed.

Work unit analysis consists of making an inventory of the total work load in terms of kinds and amounts of work to be done and the available resources with which the work is to

be performed. It should cover all activities in which the work unit is engaged and is preliminary and basic to making the annual plan.

Goals should be set for all activities appearing in the annual plan of operations. They should be based on staff time available to perform work and on standards of performance. Goals should not be set arbitrarily but should be agreed upon between the employee and his immediate supervisor.

Schedules, which supplement annual plans of operations, should be prepared on a weekly or monthly basis which will be specific as to time, place and the type of activity in which engaged. Time should not be fully scheduled; a reasonable amount should be allowed to take care of emergencies.

FUNCTIONS OF THE AREA CONSERVATIONIST¹

An area conservationist is in charge of the work of the Soil Conservation Service in a certain territory within a state. He is responsible for all phases of the work, technical as well as administrative. He works under the direction of the State Conservationist,² who is his supervisor.

The area conservationist is a line officer, and as such he functions in his area in the same manner as does a State Conservationist in a State, or a regional director in a region.

The primary function he performs is this:

He administers the planning, execution, and maintenance of a soil and water conservation program of high quality, minimum cost, and widespread application on land within his area, in full accordance with Service policies, regulations, and standards.

This statement is intended to include everything with which he is charged.

It includes the idea that the area conservationist must guide, help, assist, and counsel his people in whatever activity they engage upon, insofar as they need guidance and help, but particularly on the more difficult part of their work. More specific treatment of each of the many functions included or implied in this omnibus statement, follow:

1. SUPERVISION

He directs and supervises work unit conservationists, specialists in the area not assigned to a work unit, and clerical personnel assigned to his office.

1 This is a list of the functions (i.e., the kinds of work) that should be performed by an area conservationist, and that are present in all area conservationist's jobs. These functions should not in themselves, be considered a list of duties, since these must depend upon the particular conditions existing in each individual area. This is, in other words, a set of standard functions; but it is not a standard job description.

2 The term "State Conservationist" in this document includes the Territorial Conservationist in all cases.

The supervision of people requires the use of many skills, and it includes many phases of activity. For example, the area conservationist must see to it that the safety and health program or the information and educational program in his area is the best that can be devised - as an important part of his supervisory work. Likewise, he must provide for adequate training of all people requiring it. This he does either himself or by seeing to it that his work unit men do it, or by arranging for training to be done by appropriate Service officers of the State, region, or even Washington office.

The area conservationist has, of course, a considerable interest in the supervision of people who are not directly supervised by him. Thus, while he does not personally supervise an aid, ordinarily, or a work unit specialist, he is nevertheless responsible for seeing that these people are properly supervised.

2. OPERATIONS MANAGEMENT

He manages or provides for the management of all operations within the area for maximum accomplishment and efficiency, making full use of all necessary devices to achieve these ends, including workload analyses, annual plans of operation, schedules, production control records, inspections, group action, work improvement studies, and the like.

This is the function often referred to as "production management" or preferably, "operations management." It is this aspect of an area conservationist's job that entitles him to be called a first-line operations manager, first-line, because he is nearest to the activities of the work units. It is particularly, although not entirely, in this kind of work that he is expected to call upon and use the assistance of the assistant State conservationist in charge of operations management for the State, (or the State Conservationist himself, if there is no assistant) and of the assistant regional director in charge of

operations management for the region. These two latter people - the operations managers for the State and Region - are in a position to guide and help the area conservationist to achieve the highest possible operating efficiency. They may work with him to perfect or improve operating methods, techniques, and procedures that are utilized to get work done. They are his consultants on this type of activity.

3. TECHNICAL WORK

He directs the use of technical standards and specifications necessary for work unit operation, including soil conservation survey legends, land capability tables, practice specifications, technical guides, conservation farming or ranching guides, basic conservation plans, and the like.

This function portrays the kind of work he does to ensure a program of "high quality." In a technical agency like the Service, this work is of great importance. The stepping-up of work output, or increasing of production, for which he strives in item 3, must never be construed to imply any lowering of technical quality. Very high production of substandard work is not desired in the Service at any time.

It is in this field of work primarily, that the area conservationist makes use of the assistance of technical specialists, both those in his area and those available from the regional office. He is expected to plan for such assistance and to arrange to utilize it expeditiously and effectively.

4. DISTRICT FORMATION

He directs Service work concerned with the formation or enlargement of soil conservation districts, in accordance with Service policies and State law or regulation.

Obviously, this function is applicable only to area conservationists whose areas are not completely covered by districts; and eventually, this

function is expected to cease entirely. Responsibility for Service leadership on this activity in his area rests on the area conservationist, as with all other phases of Service work. Even so, specific delegation of this function is not only feasible, but in many cases it may be desirable. In either case, close working relationships must be maintained with representatives of State and other agencies charged with carrying on this type of activity.

5. ASSEMBLING OF DATA

He directs the assembling of data required for conservation needs, for reports of progress and accomplishment, and for other periodic or special uses.

Some of this data will be used primarily by the area conservationists for purposes of management or control. Some data will be collected in order to make reports to the State Conservationist required by him for conduct of work in the State, or for State reports to the regional or Washington office.

Provision for adequate, well-kept records that may be used to supply report data, is, of course, an important part of this function.

6. RELATIONSHIPS

He provides leadership in developing and maintaining relationships essential to the conduct of the Service program in the area.

While each work unit conservationist, for example, will represent the Service with the district governing body or bodies of the district (s) he serves, the area conservationist will see to it that the representation is adequate and will help on the more difficult problems. There will be situations in which the area conservationist may need to develop and maintain certain relationships personally. There will be others--as with a watershed job affecting several work units--in which he must work very closely with his work

unit men, even assuming full leadership if necessary. The intent, however, is to relieve the area conservationist of relationships work, insofar as possible, except for direction and guidance of it, so that he may devote more time to other phases of work. Generally, in fact, the work unit conservationist is held responsible for the relationships with the representatives of other agencies in the work unit, as part of his regular work.

7. BUSINESS MANAGEMENT

He recommends action to the State Conservationist on personnel, budgets, procurement, property, and other things needed to conduct area business.

The area conservationist maintains no business office in the ordinary sense--no budgets, accounting records, extensive personnel records, or the like. Functions of this kind are performed by the state or regional offices. The area conservationist, nevertheless, is expected to make the best possible use of all resources available to him.

Suggested Criteria for Reporting Current Conservation Needs

I. Background:

The committee of regional representatives which met in April 1952 to discuss record and report procedures proposed that current conservation needs be reported semi-annually, as a part of Work Report, form SCS-195. Dr. Salter's memorandum of May 19 to the Regional Directors approving other parts of the proposal stated: "The reporting of current conservation needs and the amounts of conservation practices on the land, as proposed will need careful consideration." Since the effective date of the first revised Work Report is to be June 30, 1953, it is necessary that procedures on both subjects be developed and issued, preferably before January 1, 1953.

As a part of the criteria and standards, it seems desirable to develop general technical requirements and Service policies with respect to:

- (1) estimating conservation needs
- (2) estimating conservation practices now on the ground.

When these two have been adequately determined for the practices used in any area, the "current conservation needs" would be the difference in the two figures for each selected practice to be reported on the SCS-195; or as frequently stated, the remaining conservation job to be done with respect to these practices in that area.

It should be realized that conservation needs information referred to here does not necessarily represent the total needs for which consideration must eventually be given by the Service. These proposed criteria pertain to measures and practices needed in connection with district work to attain certain soil and water conservation objectives.

Eventually conservation needs estimates should apply to all lands in the United States where soil and water conservation work is needed. A complete conservation needs inventory should consider such items as: watershed delineation; community problems; and group enterprise types of jobs needed; as well as the social, economic, and related factors that affect the rate of application and effectiveness of group action to attain more efficiency in the use of public funds.

The preparation of conservation needs information in the district for programming purposes, will need the full support, understanding and participation by the district supervisors, county PIA committee, and others in position to contribute.

At the district level the recommendation of local groups and individuals are essential in determining conservation needs and objectives if local support, understanding, and action are to be forthcoming.

II. Proposed criteria for preparation of conservation needs:

The following listed items give some general criteria that should be used nationally for developing estimates of practices, physical land condition, and treatments needed; we recommend that:

1. Conservation needs should be:

- (a) based on land capability and water resources data
- (b) consistent with recent technical guides
- (c) in line with trends in land use and improved farm management

2. There should be prepared for each work unit and soil conservation district a tabulation of the acreage of land capability units, as a part of the basic data for estimating conservation needs.

- (a) Where surveys have been made and measured, the tabulated data forms a basis for conservation needs.
- (b) Where survey data has not been tabulated, a sound statistical sample can be taken, measured, and projected for the area.
- (c) Where adequate survey data are not available for tabulation or projection, estimates should be made using the combined judgment of technicians who best know the area.

Note No. 1: The above land capability data is the type of material that should probably be compiled by soil scientists in the field, state, or regional offices.

3. Estimates of conservation needs should:

- (a) reflect needed conversions in land use, and
- (b) be guided by observed agricultural trends.

While statistical information, as well as past planning experiences, may be used as a guide for such estimates, the judgment of local technicians will be necessary to accurately reflect current or future trends.

4. It will be the responsibility of the work unit conservationist, assisted by the area conservationist and technical specialists, to provide estimates for:

- (a) desirable land conversions, and
- (b) essential combinations of practices that will achieve soil and water conservation in the area, guided by trends in land use.

5. Conservation needs data for practices currently used in any area are to be assembled and tabulated by name and definitions as given in the national catalog of practices. Practices reported on Work Reports, form SCS-195, are also to be coordinated with the catalog so that needs are determined and progress reports are made in the same terms and units of measure.

Note No. 2: Current conservation needs information represents the type of material that will need to be compiled at the work unit level. District demands for conservation needs data, by practices or expressed by problem areas, usable by district governing bodies and local people can be assembled in any manner that is understandable and usable at the local level.

6. Regional procedures with respect to geographic area, type of land, and coverage must come within the national standards. State, regional, and national totals can then be prepared at periodic intervals on a uniform basis. For the present (or until a national inventory is made for all land) estimates are to be confined to those lands in soil conservation districts on which the Soil Conservation Service is authorized to work.

7. Adjustments should be made in the estimates from time to time so that reports will accurately reflect current needs remaining. This could be caused by more adequate sample data, changes in land treatments recommended, correction of previous estimates when found to be in error, etc. Where major changes in the estimates are made, an explanation for the reasons should be attached.

8. Before conservation needs estimates are undertaken, a review should be made of technical guides to determine if they are current and necessary revisions are needed to bring them up-to-date.

III. General Explanation:

Land capability data of the types mentioned in 1 and 2 above are basic for planning all phases of the Service program, and are useful to many cooperating agencies and individuals. Compilations should proceed systematically on a current basis, where resources and facilities permit.

Within a county having various conservation problems, data can be readily tabulated for any particular problem area or condition. Conservation needs information for units of practices, in line with trends or conversions in land use, can be readily prepared for any land condition.

The determining of conservation on the land should be covered in the national reporting instructions, rather than as a part of the instructions on conservation needs. Perhaps estimates for the conservation applied on the land through help of Federal, State, and other agencies and individuals should be undertaken at three to five-year intervals, whereas, reports for the intervening periods would show only new work applied with Soil Conservation Service assistance. With adequate sample data for all land, both public and private, it is likely that more accurate results could be obtained for inventory purposes by sampling than by direct reporting from all field offices.

IV. Suggested Action:

It is suggested that the Washington office develop a memorandum to Regional Directors for guiding the development of conservation needs, within the principles and procedures as outlined above. As a part of such a memo, we believe that a sample should be attached with illustrations or exhibits of how the needs data could be assembled and tabulated for field record purposes at the work unit level.

We believe this memo with attachment should be issued by September 1952, so that regional instructions to the field could be developed and issued by early Fall, and the work of estimating, revising, and tabulating at the work unit levels could be done at off-season periods during the winter months.

Review of Work Improvement System

Supervision

The Council recommends that sharp emphasis be placed on the importance of the function of supervision throughout the Service. The need for such action is given added importance by the fact that new duties and responsibilities will be assumed by a large cross-section of Service personnel in connection with re-alignment plans now being put into effect. Also, there have been some recent indications of lack of adequate attention to this important responsibility. These situations, coupled with the consistent need for the highest quality of supervision in the interest of increasing production, indicate a need for concentrating attention on this function. In order to implement this course of action the Council suggests:

- (1) that special training in supervision be undertaken whenever and wherever administrative review indicates this need;
- (2) that inspection officers be instructed to make a thorough and special review of the quality and effectiveness of supervision at each inspection point;
- (3) that administrative officials consistently emphasize the necessity of good supervision at every appropriate opportunity, with a view to making approved supervision techniques a habit of operation;
- (4) that the Chief of the Service expand and emphasize his thoughts on supervision expressed in the Council in a memorandum on the subject to be given appropriate distribution throughout the Service.

Discontinuance of Work Improvement System Chart

The Council recommends that the use of the Work Improvement System Chart, showing work improvement responsibilities for field offices and Washington be

discontinued. This statement has served its purpose by emphasizing the need for systematizing work operations through the application of known principles of good management. The Council believes that revised functional statements being developed together with better understanding of management principles and techniques throughout the Service should make further maintenance of the chart unnecessary.

It is suggested that henceforth the term "operations management" be used in referring to the area of activity formerly included under the old "Work Improvement System." "Operations management" is consistent with functional statements and job descriptions now being developed in the Service. Use of this term will avoid some of the confusion which has resulted from the name "Work Improvement System".

Improving Work Methods, Procedures, and Techniques.

The Council recommends that additional emphasis be given this job by making provision for appropriate trials, studies, and the like, in plans of operation and by other means. Work improvements resulting from such activities can lead to important gains in getting conservation on the land and should be encouraged. The Council believes, however, that such activities should be subject to such control as will keep them in balance with other required work and suggests that close review of progress on plans of operation and production records may constitute adequate control.

